

# 1122 eMARS Business Objects Web1 to Desk1 Report Redevelopment February 18, 2010



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# Agenda

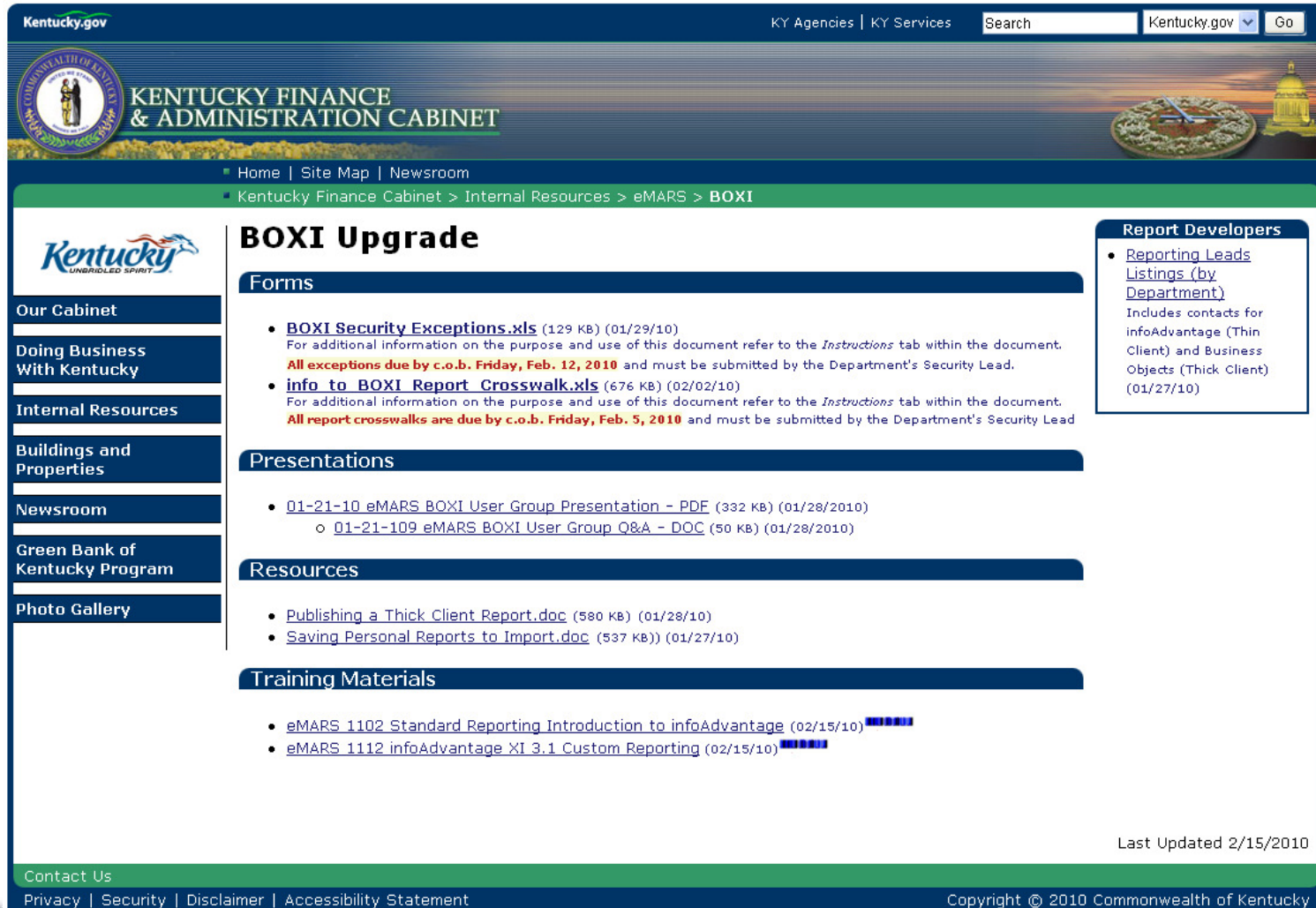
- Introduction
- Desktop Intelligence Overview (Ch. 1-7)
- Guide to Report Redevelopment
  - Use of Webl to Redevelop Deskl Reports
  - Formatting Tips & Tricks
  - Flag Variables
  - Report Filters
- More Deskl Overview (Ch. 8-14)
- Q&A

***(LUNCH)***



# BOXI Upgrade Web Page

<http://finance.ky.gov/internal/eMARS/boxi.htm>



The screenshot shows the 'BOXI Upgrade' web page on the Kentucky Finance & Administration Cabinet website. The page has a blue header with the Kentucky.gov logo and navigation links. A green breadcrumb trail reads: 'Kentucky Finance Cabinet > Internal Resources > eMARS > BOXI'. The main content area is titled 'BOXI Upgrade' and is divided into several sections: 'Forms', 'Presentations', 'Resources', and 'Training Materials'. Each section contains a list of links to documents and presentations, including file names, sizes, and dates. A sidebar on the left lists various website categories like 'Our Cabinet', 'Doing Business With Kentucky', and 'Internal Resources'. A 'Report Developers' box on the right provides contact information for infoAdvantage and Business Objects. The footer includes a 'Contact Us' link, a copyright notice for 2010, and a 'Last Updated' date of 2/15/2010.

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KENTUCKY FINANCE & ADMINISTRATION CABINET

Home | Site Map | Newsroom

Kentucky Finance Cabinet > Internal Resources > eMARS > BOXI

## BOXI Upgrade

### Forms

- [BOXI Security Exceptions.xls](#) (129 KB) (01/29/10)  
For additional information on the purpose and use of this document refer to the *Instructions* tab within the document.  
**All exceptions due by c.o.b. Friday, Feb. 12, 2010** and must be submitted by the Department's Security Lead.
- [info to BOXI Report Crosswalk.xls](#) (676 KB) (02/02/10)  
For additional information on the purpose and use of this document refer to the *Instructions* tab within the document.  
**All report crosswalks are due by c.o.b. Friday, Feb. 5, 2010** and must be submitted by the Department's Security Lead

### Presentations

- [01-21-10 eMARS BOXI User Group Presentation - PDF](#) (332 KB) (01/28/2010)
  - [01-21-109 eMARS BOXI User Group Q&A - DOC](#) (50 KB) (01/28/2010)

### Resources

- [Publishing a Thick Client Report.doc](#) (580 KB) (01/28/10)
- [Saving Personal Reports to Import.doc](#) (537 KB) (01/27/10)

### Training Materials

- [eMARS 1102 Standard Reporting Introduction to infoAdvantage](#) (02/15/10) [PDF]
- [eMARS 1112 infoAdvantage XI 3.1 Custom Reporting](#) (02/15/10) [PDF]

#### Report Developers

- [Reporting Leads Listings \(by Department\)](#)  
Includes contacts for infoAdvantage (Thin Client) and Business Objects (Thick Client) (01/27/10)

Last Updated 2/15/2010

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# InfoAdvantage

6.5 (Current)		BO XI (3/1/2010)
Web	Webi “infoAdvantage”	Webi
Desktop	Business Objects “Thick Client”	Deski

# Business Objects XI Desktop Intelligence Overview



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# Desktop Intelligence

## ➤ Why learn DeskI if WebI will be used going forward?

- Existing reports developed in Thick Client will be available 3/1 but they will be DeskI reports
- Redevelopment of these reports in WebI must be done by 12/31/2010
- Reports needed for closeout should be redeveloped earlier (recommended by 6/1/2010)
- Need to be able to analyze DeskI reports to redevelop

## ➤ Why Lecture Style?

- Material takes 2-3 days to go through hands-on
- Should already be familiar with Thick Client

# Desktop Intelligence

## ➤ When will Deskl software be available?

- Consolidated agencies (COT):
  - Early next week
  - Look for folder in Start:Programs (p.7)
- Non-consolidated agencies:
  - Technical leads will receive email early next week
  - Includes link to FTP site and instructions
  - Software will be installed to users holding BO licenses
  - Coordinate with technical leads

## ➤ Correction p.7 in book – Deskl Login Window

- System: [kyeasxboxiw.eas.ds.ky.gov:6400](http://kyeasxboxiw.eas.ds.ky.gov:6400)

# Desktop Intelligence – Flag Rule

*Create a flag for any conditions (as a Dimension), then use the Where clause in the definition of your measure.*

## ➤ When to Use

- Whenever **If...Then...Else** was previously used in a variable definition

**[Measure]=If ([Type]=7) Then [Amount] Else 0**

## ➤ Setting Up the Flag Variable

- Use naming convention: **Measure → Measure Flag**
- Keep same conditions but add flags

**[Measure Flag]=If ([Type]=7) Then “Yes” Else “No”**

## ➤ Setting Up the Measure (Where Clause)

- “Include the amount whenever the flag is Yes”

**[Measure]=[Amount] Where ([Measure Flag]=“Yes”)**



# Questions?



# Business Objects XI Guide to Report Redevelopment



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# Report Redevelopment

**Upgrading Business Objects 6.5 software  
(eMARS infoAdvantage) to new BO XI platform  
(Release 3.1)**

## ➤ **Why Upgrade?**

- SAP/CGI Support
- Improved Functionality

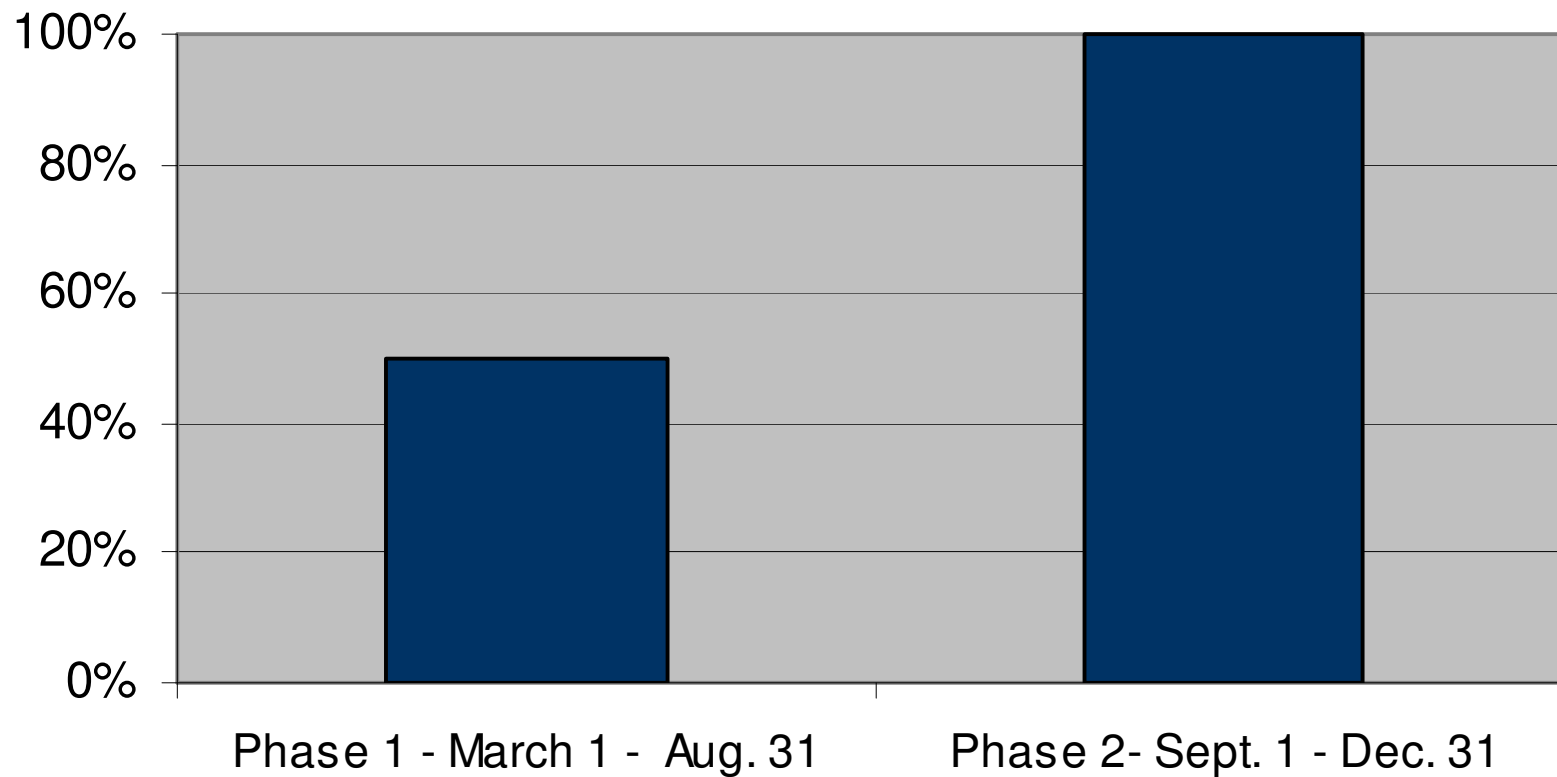
## ➤ **Why Redevelop?**

- Thick Client/Desktop Intelligence being phased out
- Technical Hardware requirements
- No named licenses required for Webi



# Report Redevelopment Phases

## Deski Reports Redeveloped in Webi



# Report Redevelopment Process

## ➤ **Make a list of Desk reports**

- Update the list provided during upgrade
- Consider Personal reports too

## ➤ **Prioritize Desk reports**

- Identify the reports you need to redevelop in WebI
  - Delete any reports no longer needed
- Determine in which phase each report will be redeveloped
  - Complete reports needed for closeout by 6/1/2010

## ➤ **Recreate Reports in WebI**

- Dual monitors are helpful

# Report Redevelopment Tips

## ➤ Document Reports *(See Appendix A for sample)*

- Minimally, use outline of report documentation as a guide to identifying report components

## ➤ Take Steps Up Front to Ensure Consistency

—Develop a template *(See Appendix B for sample)*

- Include report title, page numbers, run date and time

—Use a Quality Assurance checklist

*(See Appendix C for sample)*

- Someone other than developer should do QA



# Report Redevelopment Tips

## ➤ **Copy Similar Web Intelligence Reports and Modify Them**

1. Make a Copy of the Existing WebI Report
2. Rename the Report
3. Modify the Report
4. Change the Universe for a Query

# Report Redevelopment Tips

## ➤ **Formatting Tips & Tricks**

- Copy & Paste Using Ctrl-Drag-and-Drop
- Including UserResponse Prompt Values
- Including Page Numbers
- Including Run Date and Run Time Values
- Aligning Cells
- Using the Paintbrush for Formatting
- Using Relative Positioning
- Setting the Page Layout
- Formatting Headers
- Removing Formatting from Tables
- Formatting Amounts

# Questions?



# Report Redevelopment – Flag Variables

## ➤ When to Use

- Whenever **If...Then...Else** was previously used in a variable definition

**[Measure]=If ([Type]=7) Then [Amount] Else 0**

## ➤ Setting Up the Flag Variable

- Use naming convention: **Measure** → **Measure Flag**
- Keep same conditions but add flags

**[Measure Flag]=If ([Type]=7) Then “Yes” Else “No”**

## ➤ Setting Up the Measure (Where Clause)

- “Include the amount whenever the flag is Yes”

**[Measure]=[Amount] Where ([Measure Flag]=“Yes”)**

# Report Redevelopment – Flag Variables

## ➤ Example – Cash Expenditures

— Old Variable:

**[Cash Expenditure]=If ([Closing Classification]="10")  
Then [Posting Amount] Else 0**

— New Flag:

**[Cash Expenditure Flag]=If ([Closing Classification]="10")  
Then "Yes" Else "No"**

— New Measure:

**[Cash Expenditure]=[Posting Amount]  
Where ([Cash Expenditure Flag]="Yes")**

# Report Redevelopment – Flag Variables

## ➤ Example – Accrued Expenditures

— Old Variable:

[Accrued Expenditure]=If ([Closing Classification]="11")  
Then [Posting Amount] Else 0

— New Flag:

[Accrued Expenditure Flag]=  
If ([Closing Classification]="11")  
Then "Yes" Else "No"

— New Measure:

[Accrued Expenditure]=[Posting Amount]  
Where ([Accrued Expenditure Flag]="Yes")



# Questions?



# Report Redevelopment – Report Filters

## ➤ When to Use

- If displaying only part of data retrieved by query
  - Example: Current Period tab in ITD report
  - Example: Budget Report showing only accounts with current activity

## ➤ Applying a Simple Report Filter

- Use **Show/Hide Report Filter Toolbar** button
- Drag objects into filter panel; create dropdowns
- **Warning:** Users can change or remove this kind of filter

# Report Redevelopment – Report Filters

- **Applying a Complex Report Filter**
  - Use **Show/Hide Filter Pane** button
  - Drag objects into filter panel; identify operator and value(s)
  - Users cannot change this kind of filter
- **Using a Filter Variable**
  - Define a filter variable containing the filter condition
  - Drag filter variable into filter panel; select “Equal to” operator and enter value “1” (=TRUE)
  - Example: **Fund Type filter= ([Fund Type]=“1300”)**
  - Most flexible in that any condition may be used

# Report Redevelopment – Report Filters

- **Applying Filters to Part of a Report**
  - Select the part of the report to which you are applying the filter
  - Use **Map : Filters** to see where filters have been applied
  - Use **Map : Structure** to identify the part of the report to which a filter should be applied

# Questions?



# Business Objects XI Desktop Intelligence Overview



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# Desktop Intelligence

## ➤ Chapter 8 - Sections

- Introduces the Travel universe
- Employs “Avoid Duplicate Rows Aggregation”
- Demonstrates creation of Sections
- Uses Folding to create Totals in Sections
- Introduces the *#MULTIVALUE* error and resolution

## ➤ Chapter 9 – Slice & Dice (no changes)

## ➤ Chapter 10 - Breaks

- Demonstrates the value of the “Flag Rule”
- Introduces the *#COMPUTATION* error and resolution
- Demonstrates hiding variables and folding
- Employs Breaks and demonstrates formatting them

# Desktop Intelligence

- **Chapter 11 – Joining Multiple Data Providers**
  - Introduces creation of one query from another
  - Demonstrates changing Universes for a query
  - Uses Linking to join queries/data providers
  - Introduces incompatible objects and workaround
- **Chapter 12 – Drill Down & Scope of Analysis**
  - Introduces Fixed Assets universe
  - Discusses hierarchical structure of classes
  - Demonstrates Scope of Analysis and Drilling
    - Drill down, drill up, drill across, drill through
- **Chapter 13 – Combine Queries (no changes)**

# Desktop Intelligence

- **Chapter 14 – Retrieving and Editing a Shared Report**
  - Introduces *Import From Repository...*
  - Demonstrates changing formulas (*[Posting Amount]* vs. *[Pstng Amount]*)
  - Uses Folding to create Grand Total line

# Questions?

